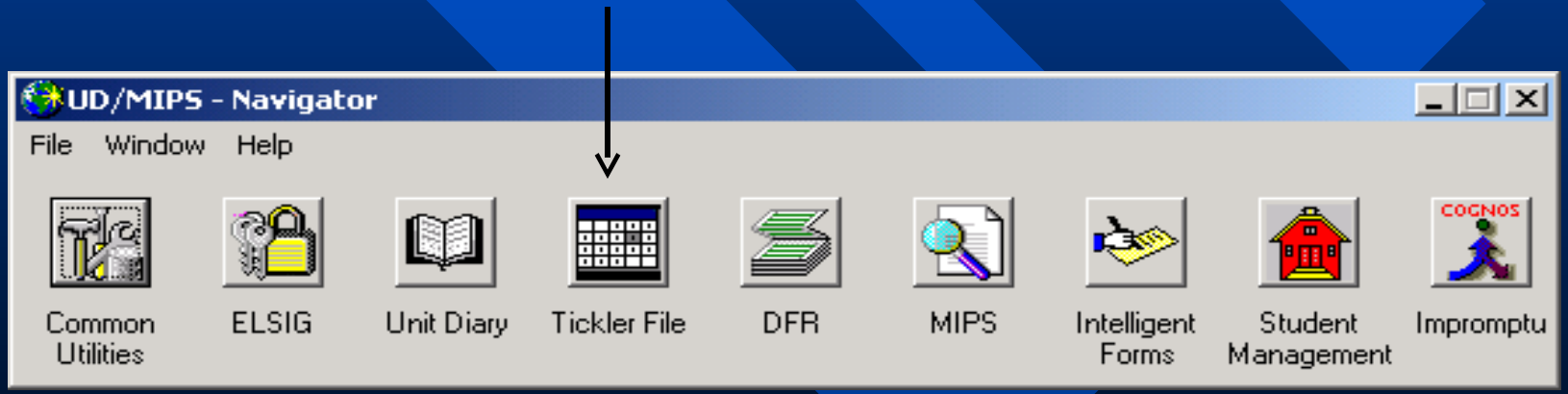
UDMIPS TICKLER FILE FUNCTIONALITIES

MISSO 16/17

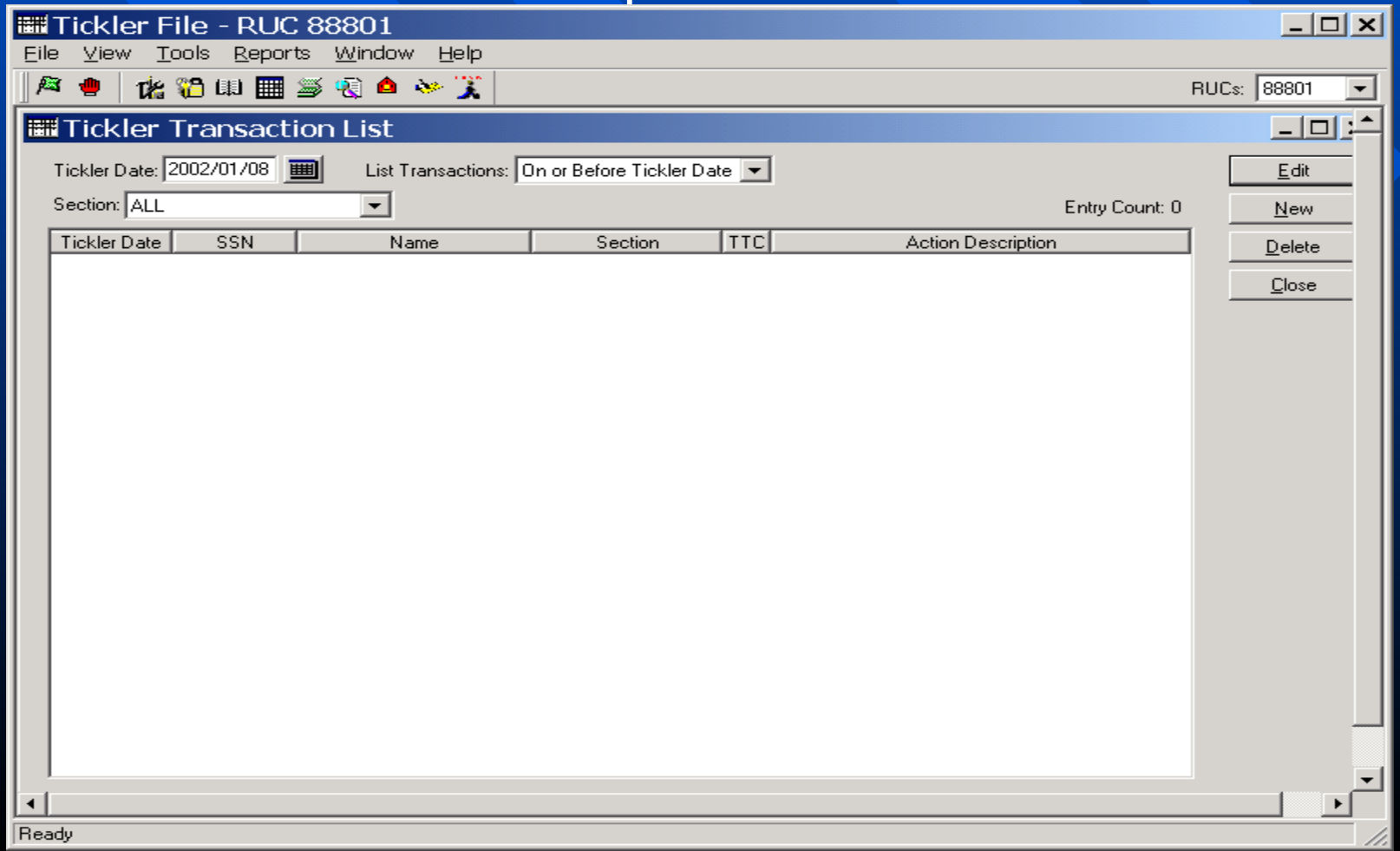
GETTING TO THE TTL

- Begin on the UD/MIPS Navigator window. Select Tickler file.



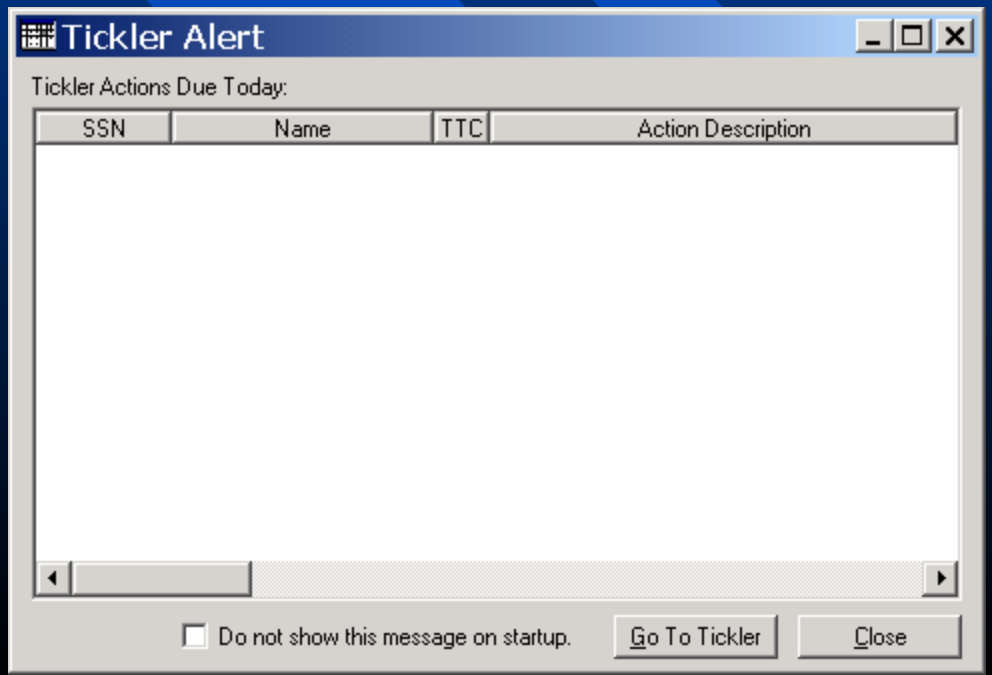
GETTING TO THE TTL

- The Tickler Transaction List window opens.



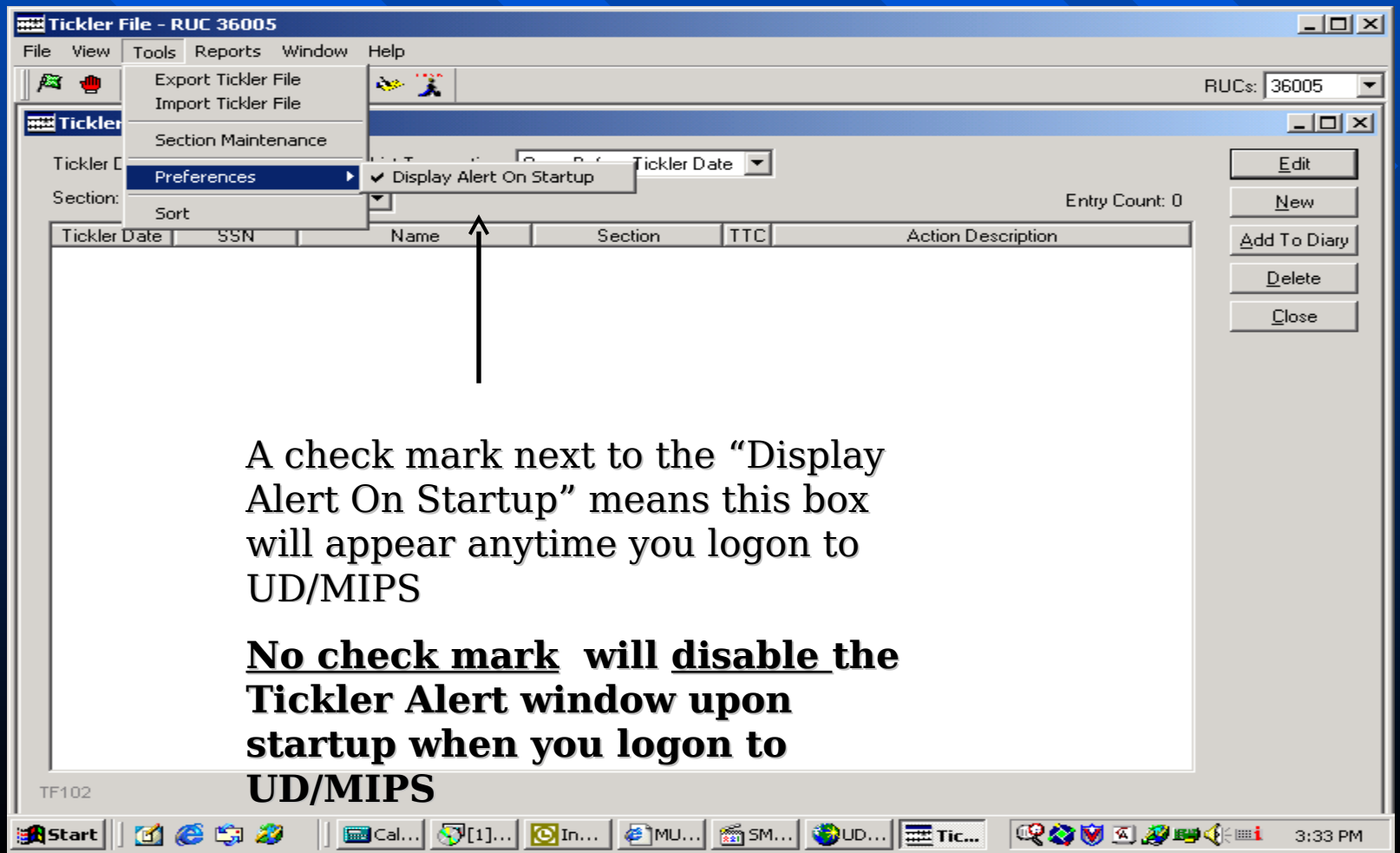
TICKLER ALERT WINDOW

When you first log in to UDMIPS the Tickler Alert Window appears, unless you disable this function. This list displays Tickler Transactions due the day your logging in, with the following information : SSN, members name, TTC- indicates whether or not a TTC is attached to the tickler, Action description-either the TTC English statement, if applicable ‘a note to self’ for future action to take on the member



SETTING UP YOUR DESIRED PREFERENCE

PREVENTING THE TICKLER ALERT WINDOW FROM AUTOMATICALLY DISPLAYING

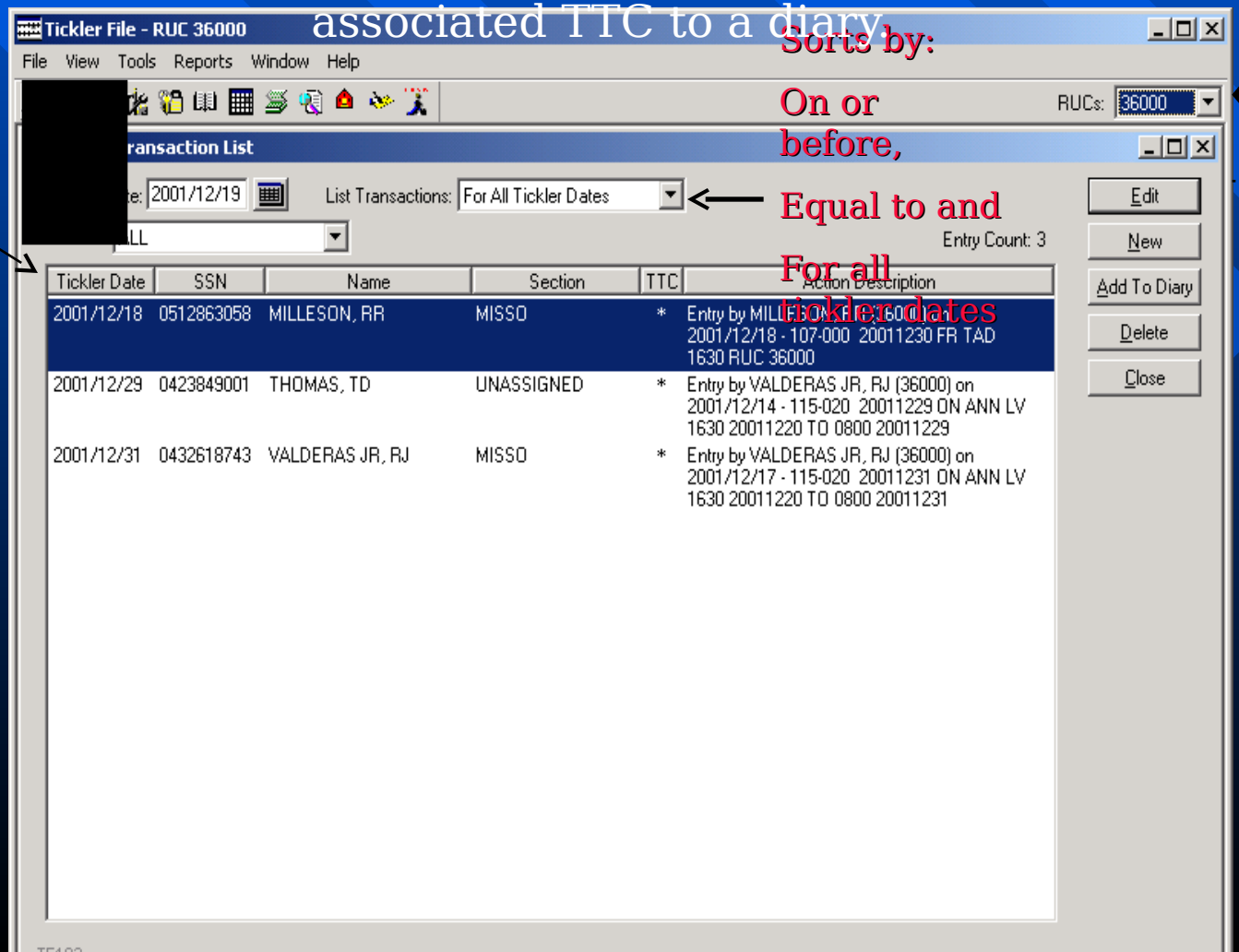


A check mark next to the “Display Alert On Startup” means this box will appear anytime you logon to UD/MIPS

<u>No check mark</u> will <u>disable</u> the Tickler Alert window upon startup when you logon to UD/MIPS

TICKLER TRANSACTION LIST (TTL)

- This window displays a summary of all ticklers entered for the RUC you logged in with. Several filter functions allow you to control the subset of tickler transactions available to you in the list. From this window you can refresh, add, edit or delete ticklers and add an associated TTC to a diary.


Tickler File - RUC 36000
File View Tools Reports Window Help
RUCs: 36000
ransaction List
e: 2001/12/19
List Transactions: For All Tickler Dates
LL
Entry Count: 3
Edit
New
Add To Diary
Delete
Close
Tickler Date SSN Name Section TTC Action Description
2001/12/18 0512863058 MILLESON, RR MISSO * Entry by MILLESON, RR (36000) on 2001/12/18 - 107-000 20011230 FR TAD 1630 RUC 36000
2001/12/29 0423849001 THOMAS, TD UNASSIGNED * Entry by VALDERAS JR, RJ (36000) on 2001/12/14 - 115-020 20011229 ON ANN LV 1630 20011220 TO 0800 20011229
2001/12/31 0432618743 VALDERAS JR, RJ MISSO * Entry by VALDERAS JR, RJ (36000) on 2001/12/17 - 115-020 20011231 ON ANN LV 1630 20011220 TO 0800 20011231

Lists tickler dates

Sorts by:

On or before,

Equal to and

For all tickler dates

If your ruc is not a conad, you will only get your ruc. If your ruc is a conad the drop down

FILTERING AVAILABLE TRANSACTIONS

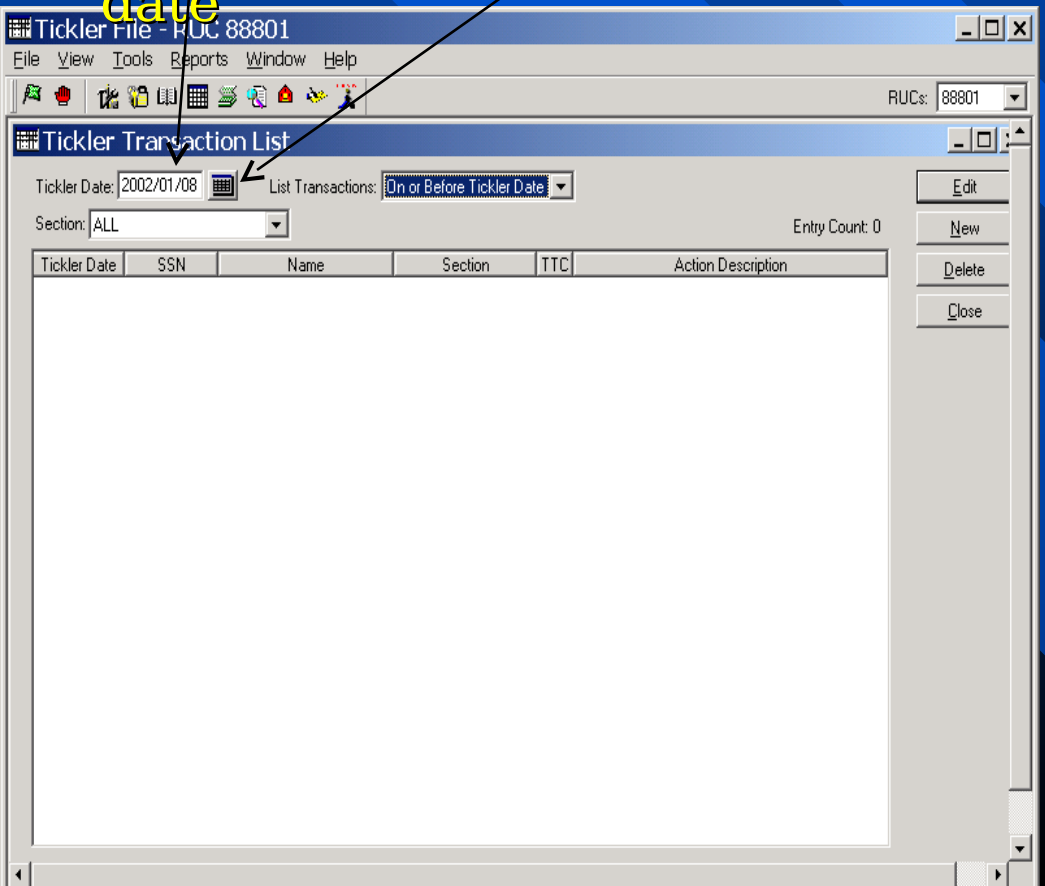
- There are 4 ways to filter Tickler File transactions: By Tickler date, List Transactions, Sections, or by RUCs (Keep in mind if there are no Sections you can't filter by Sections, additionally if you're not a CONAD RUC you can only view your RUC).

FILTERING TRANSACTIONS TICKLER DATE

By Tickler Date change the date or click on the calendar to find a date, change it and press OK

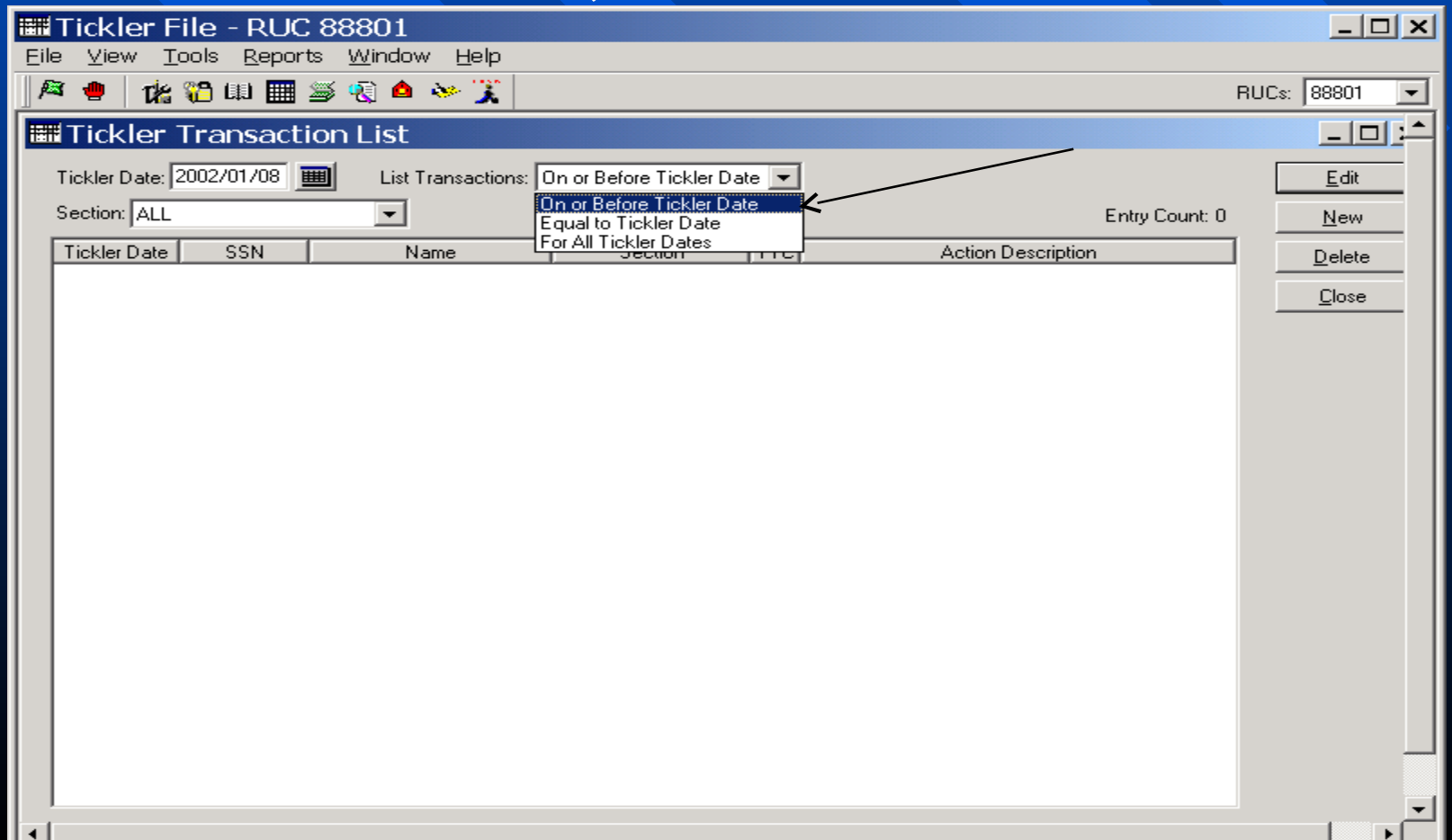
Change date

Calendar



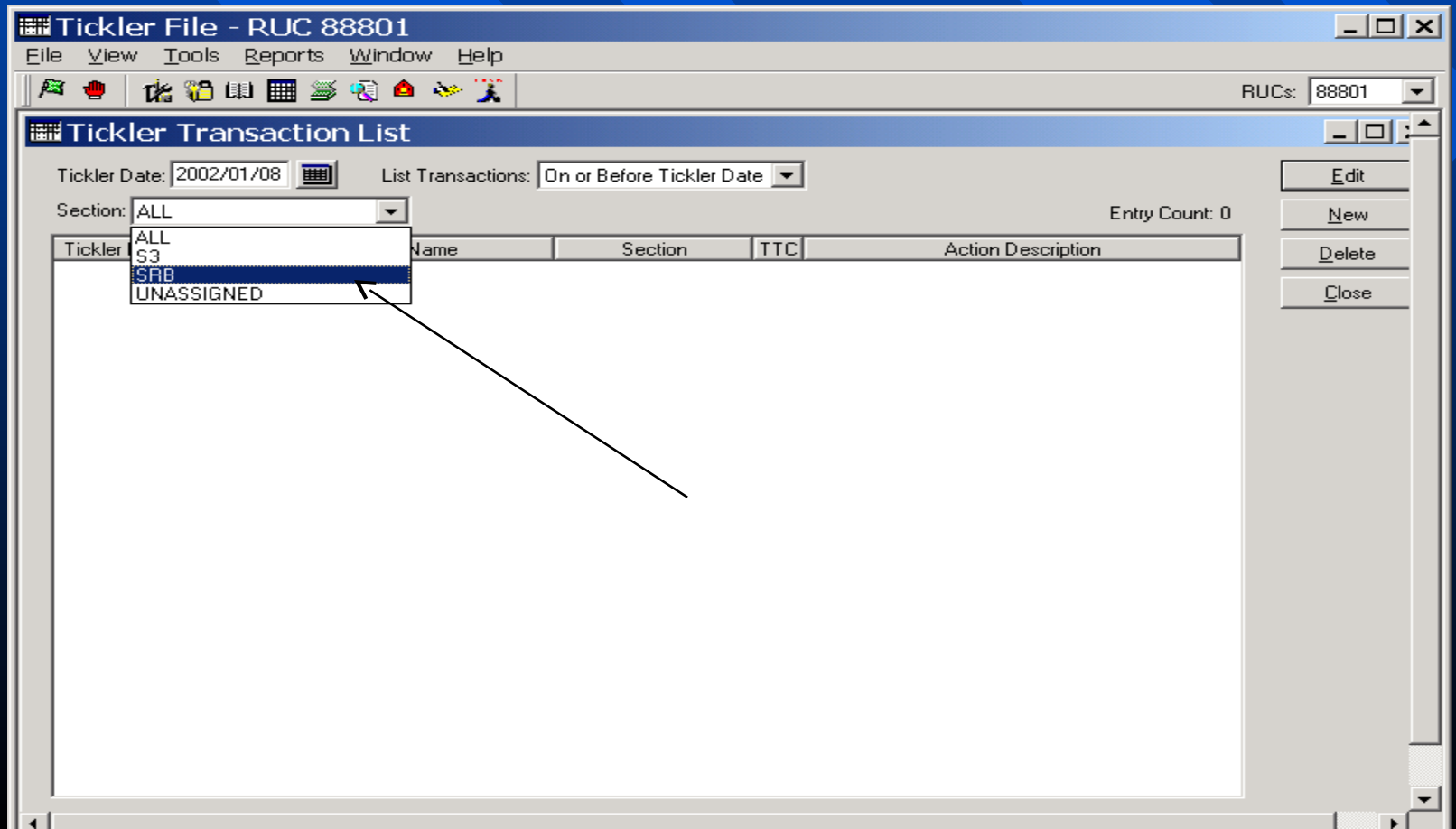
FILTERING TRANSACTIONS TRANSACTION LIST

List Transactions gives you the options to choose On or before Tickler Date, Equal to Tickler Date, or For All Tickler Dates



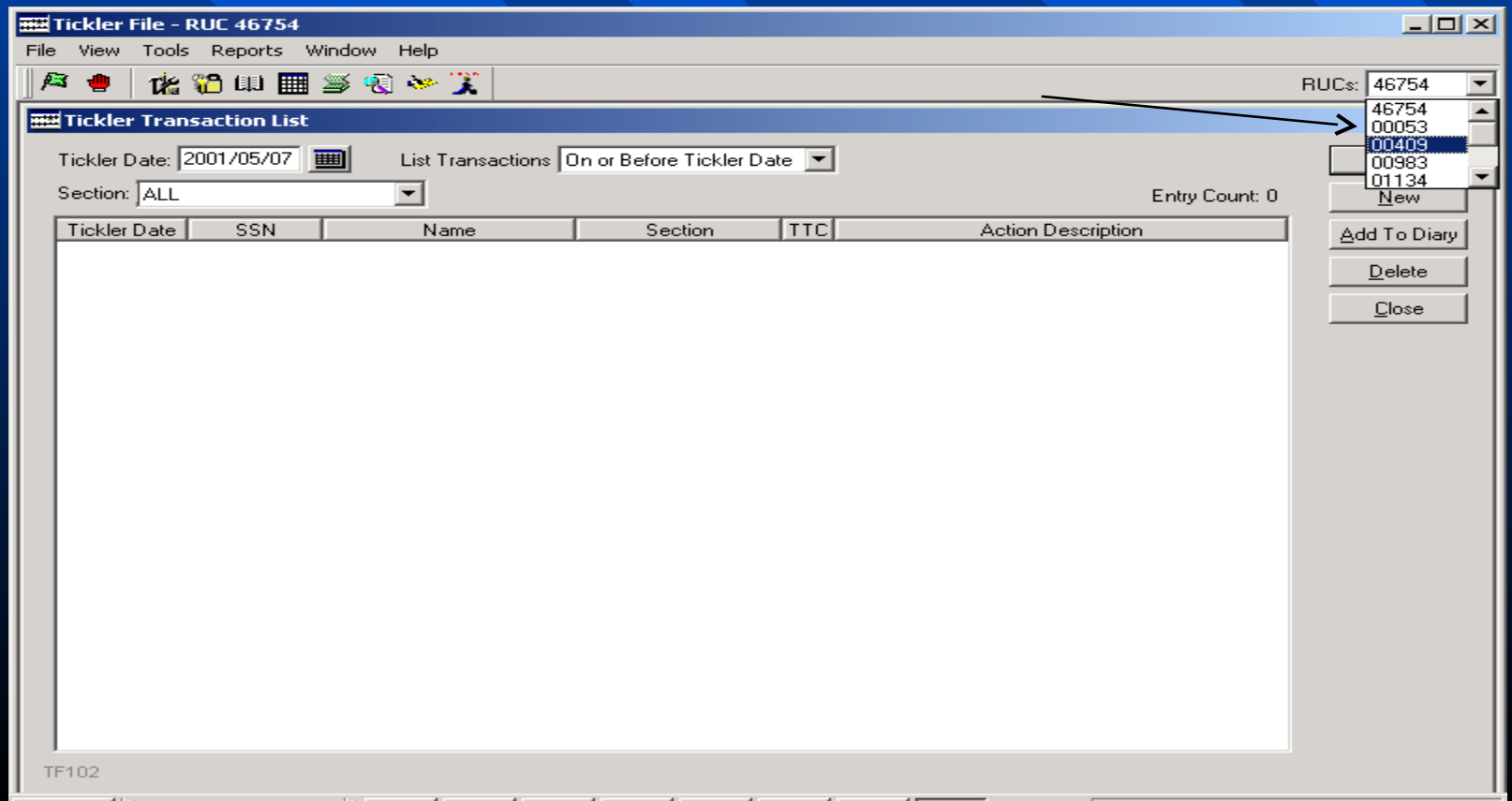
FILTERING TRANSACTIONS BY SECTION

You must have sections previously established to view by sections. Once established, simply select which section



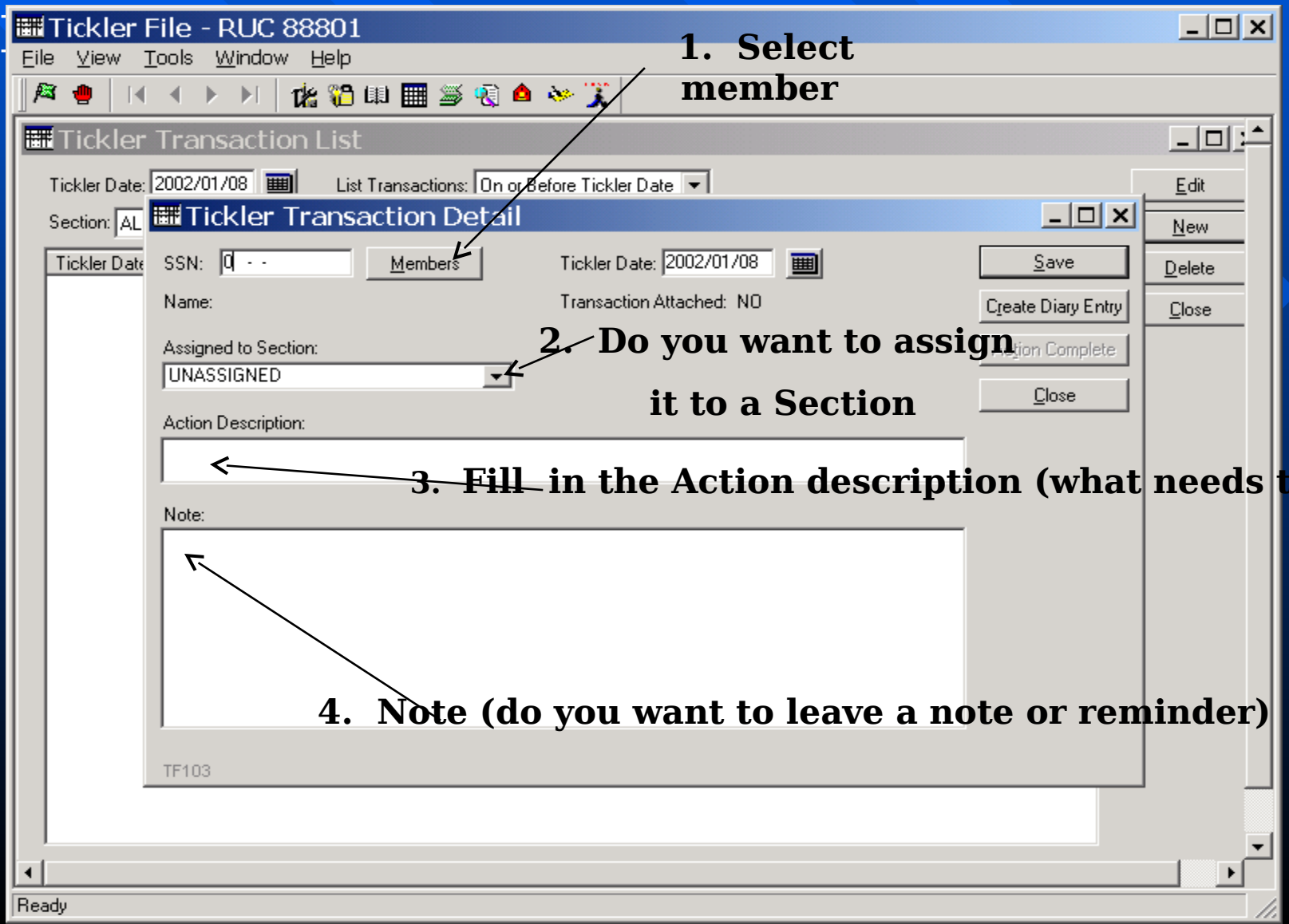
FILTERING TRANSACTIONS FROM SPECIFIC RUCS

In the RUC'S list (Admin RUCs only) , choose the desired RUC. In the Tickler Date Box, type the desired Tickler Date in



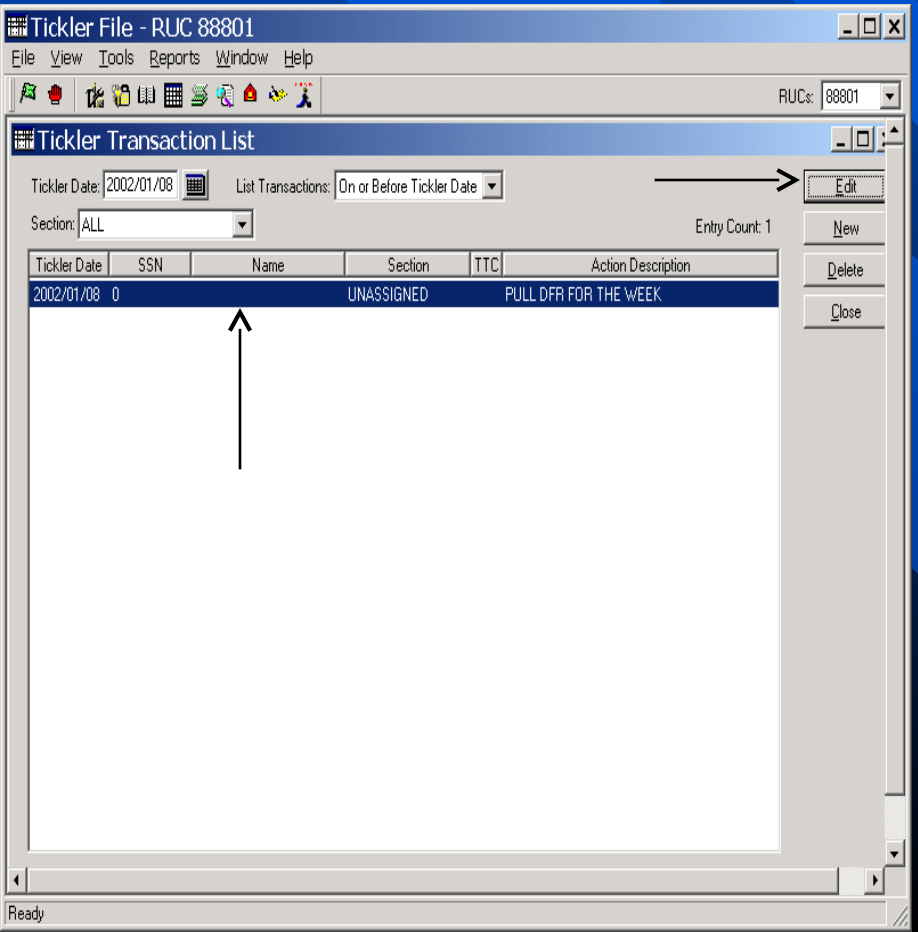
CREATING NEW TICKLER ENTRIES

- The Tickler Transaction List window opens. Click New. The Tickler transaction Detail window a

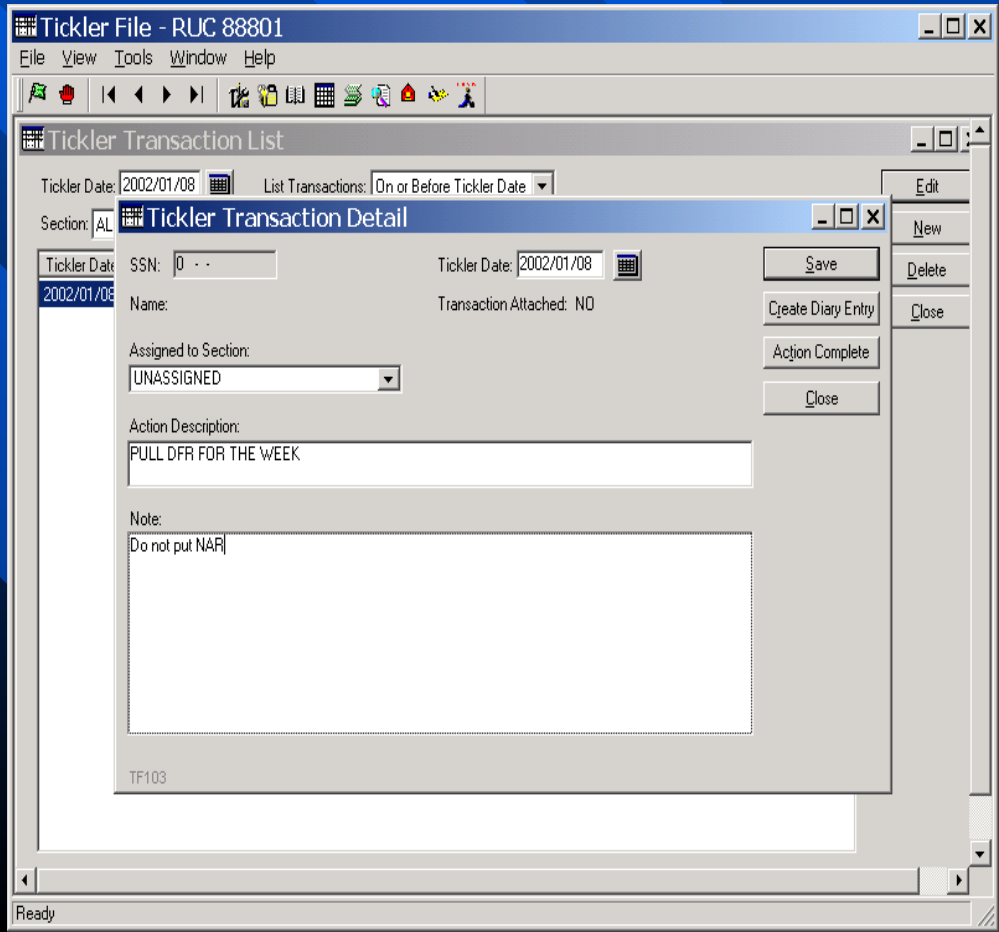


Editing Tickler Transactions

To Edit select a Tickler Transaction, then choose edit.

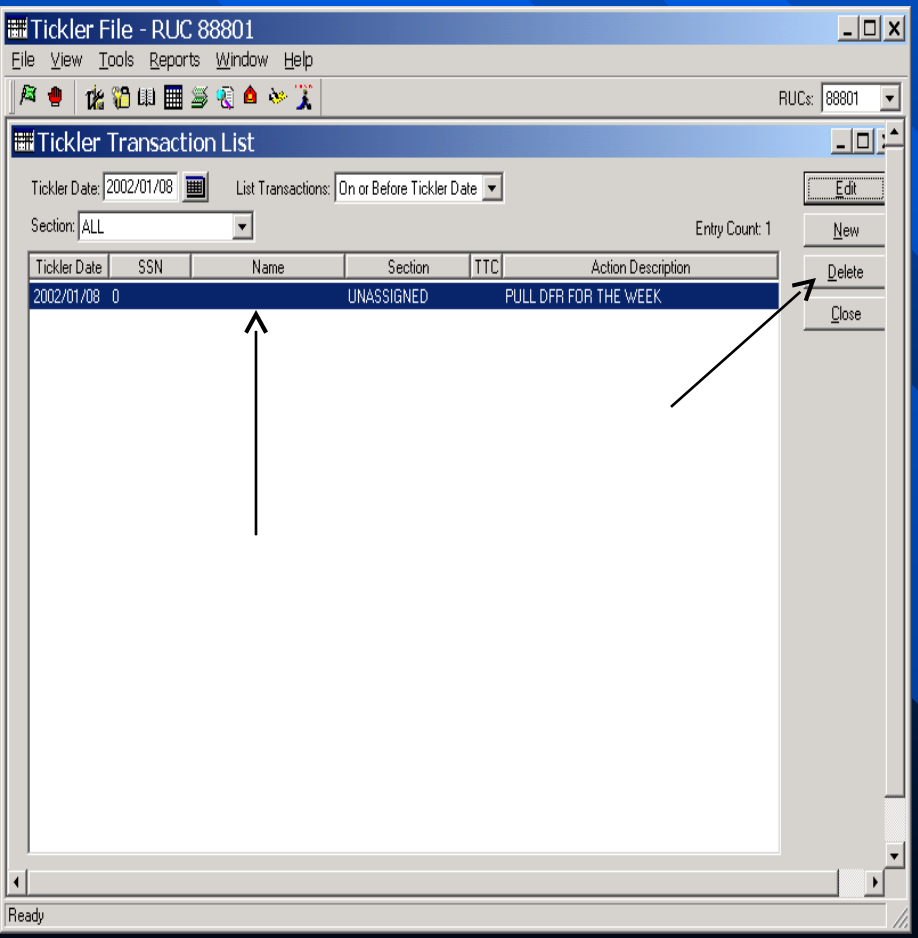


The Tickler Transaction Detail window opens. Make

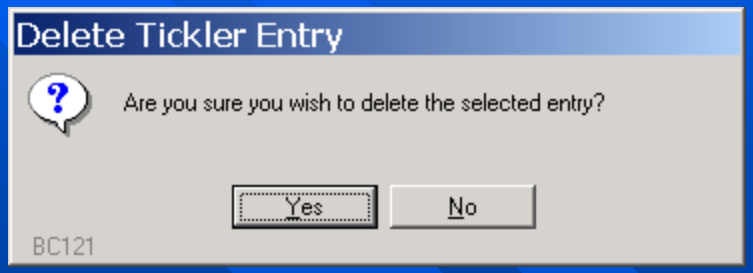


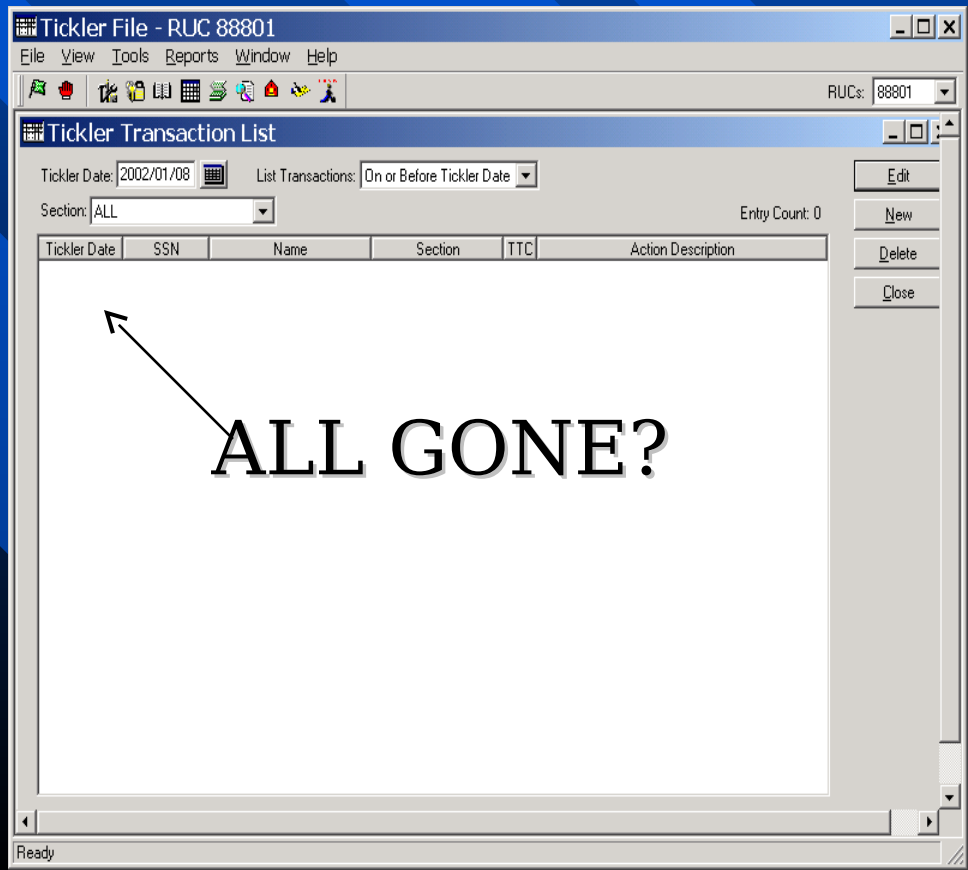
Deleting Tickler Transactions

To Delete select a tickler transaction, then choose delete

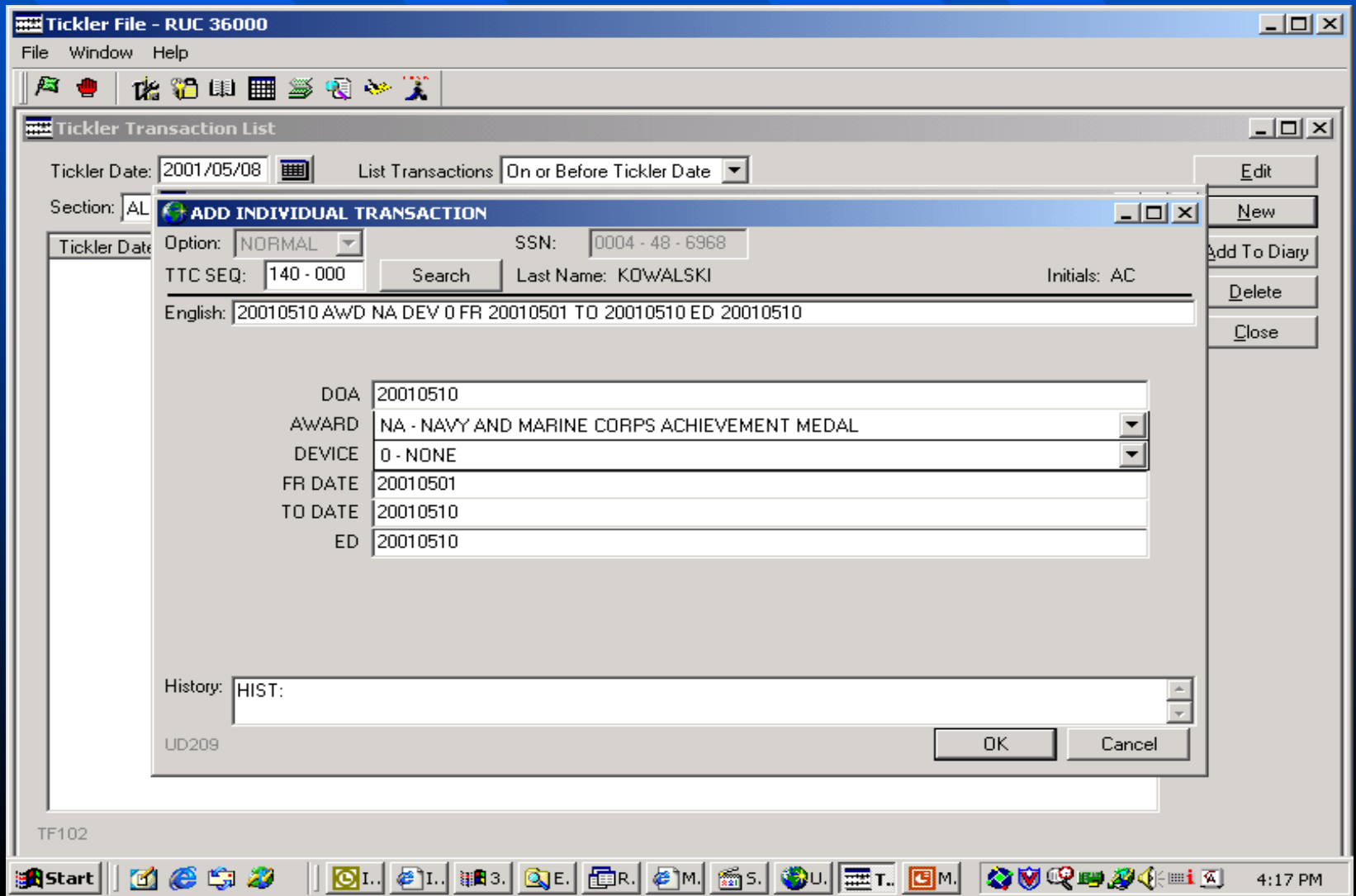


. The Delete Tickler Entry window opens

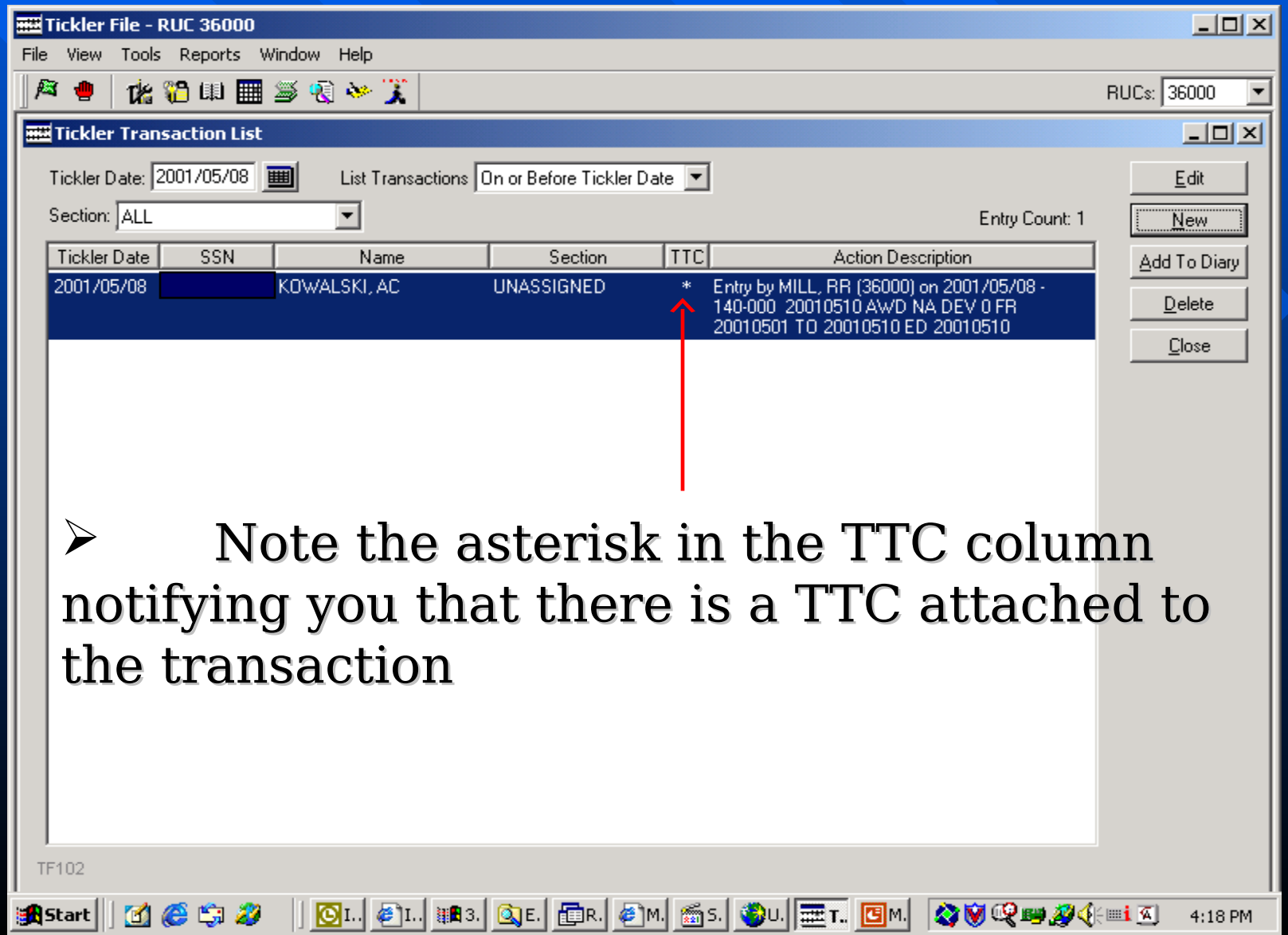




ATTACHING A TTC TO THE TICKLER TRANSACTION

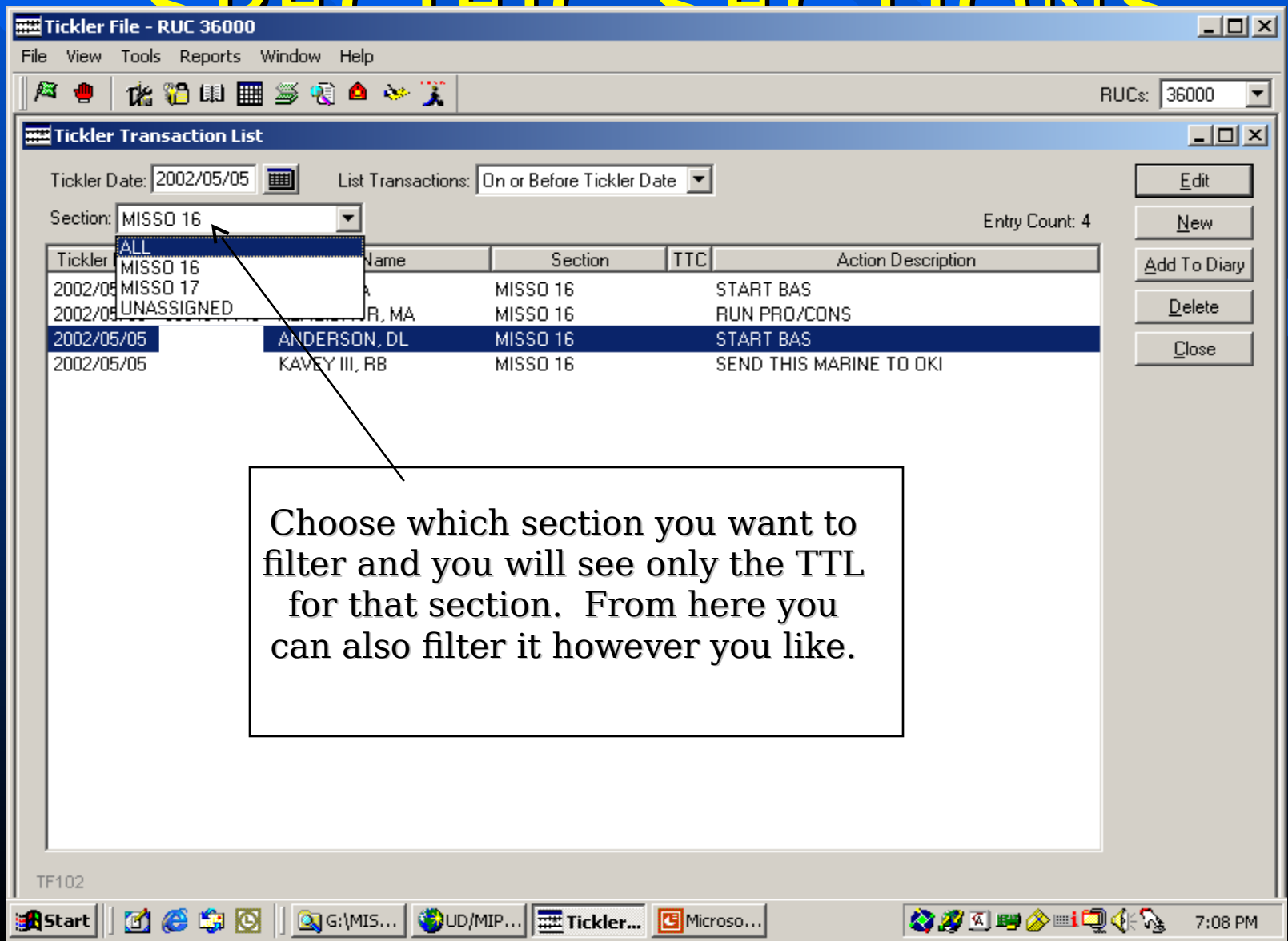


ATTACHING A TTC TO THE TICKLER TRANSACTION


Tickler File - RUC 36000
File View Tools Reports Window Help
RUCs: 36000
Tickler Transaction List
Tickler Date: 2001/05/08
List Transactions On or Before Tickler Date
Section: ALL
Entry Count: 1
Edit
New
Add To Diary
Delete
Close
Tickler Date SSN Name Section TTC Action Description
2001/05/08 KOWALSKI, AC UNASSIGNED * Entry by MILL, RR (36000) on 2001/05/08 - 140-000 20010510 AWD NA DEV 0 FR 20010501 TO 20010510 ED 20010510
TF102
Start
4:18 PM

- Note the asterisk in the TTC column notifying you that there is a TTC attached to the transaction

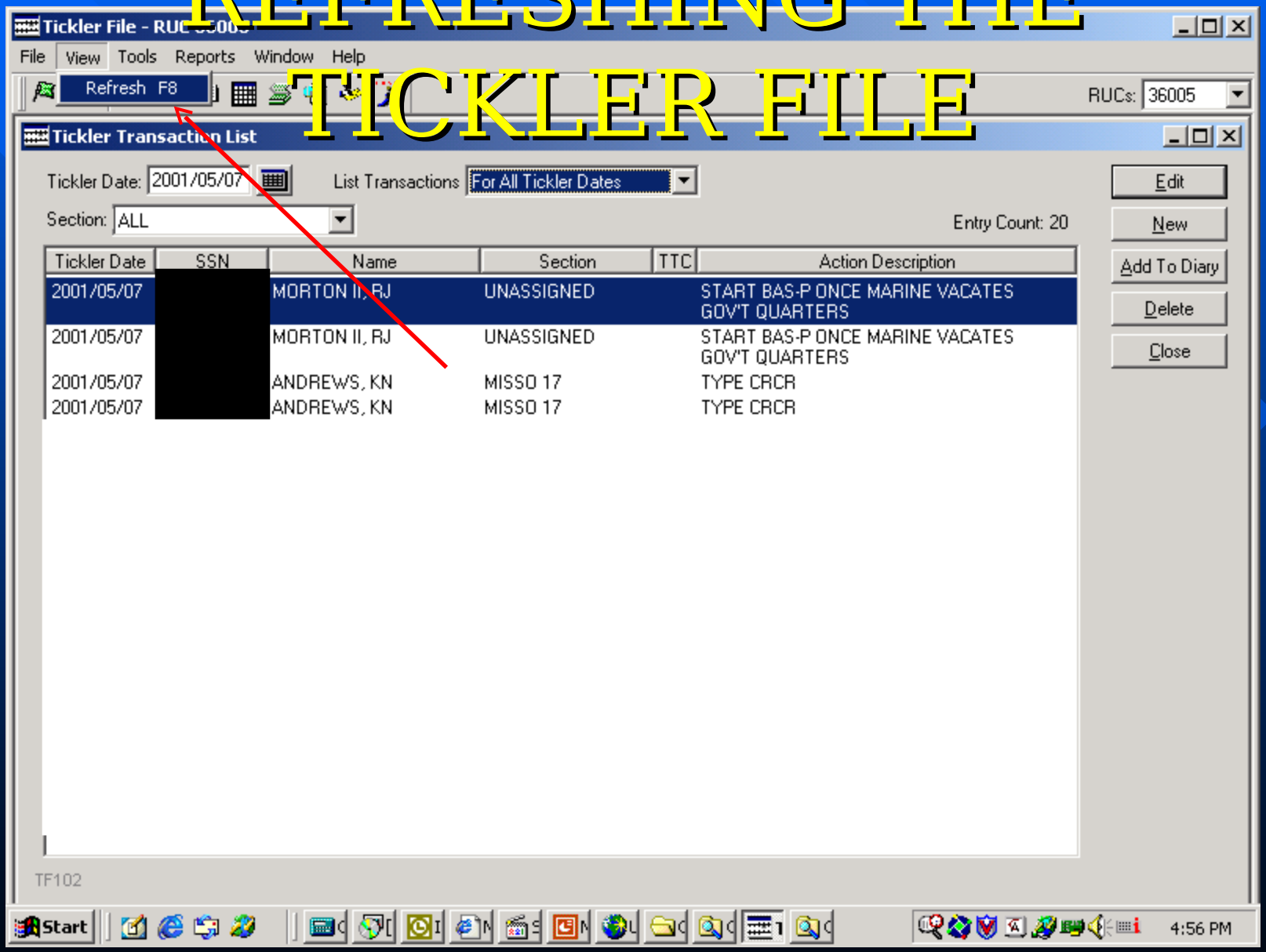
FILTERING TRANSACTIONS FROM SPECIFIC SECTIONS


Tickler File - RUC 36000
File View Tools Reports Window Help
RUCs: 36000
Tickler Transaction List
Tickler Date: 2002/05/05
List Transactions: On or Before Tickler Date
Section: MISSO 16
ALL
MISSO 16
MISSO 17
UNASSIGNED
Entry Count: 4
Edit
New
Add To Diary
Delete
Close
Tickler Date | Name | Section | TTC | Action Description
2002/05/05 | MISSO 16 | START BAS
2002/05/05 | R, MA | MISSO 16 | RUN PRO/CONS
2002/05/05 | ANDERSON, DL | MISSO 16 | START BAS
2002/05/05 | KAVEY III, RB | MISSO 16 | SEND THIS MARINE TO OKI
Choose which section you want to filter and you will see only the TTL for that section. From here you can also filter it however you like.
TF102
Start
G:\MIS...
UD/MIP...
Tickler...
Microso...
7:08 PM

REFRESHING THE TICKLER FILE

- From the view menu, choose the Refresh option. **The Tickler Transaction List window is refreshed.** This window allows you to add and delete sections used by the Tickler File module. If you import section names into a file where those names already exist, a message informs you that the name is already in your current section list and asks you to type a new name for the incoming section.
- *Only for server/work group environments

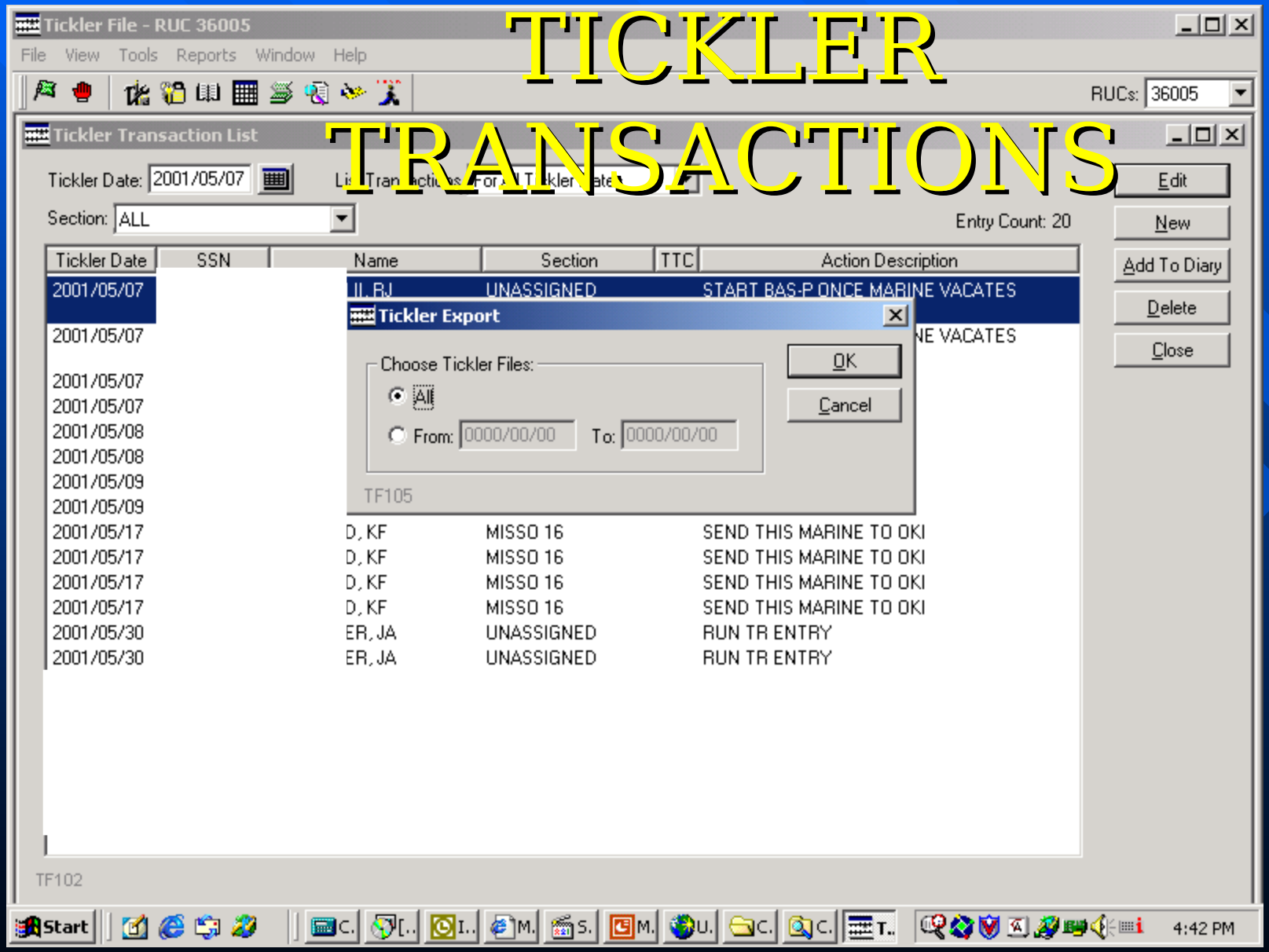
REFRESHING THE TICKLER FILE



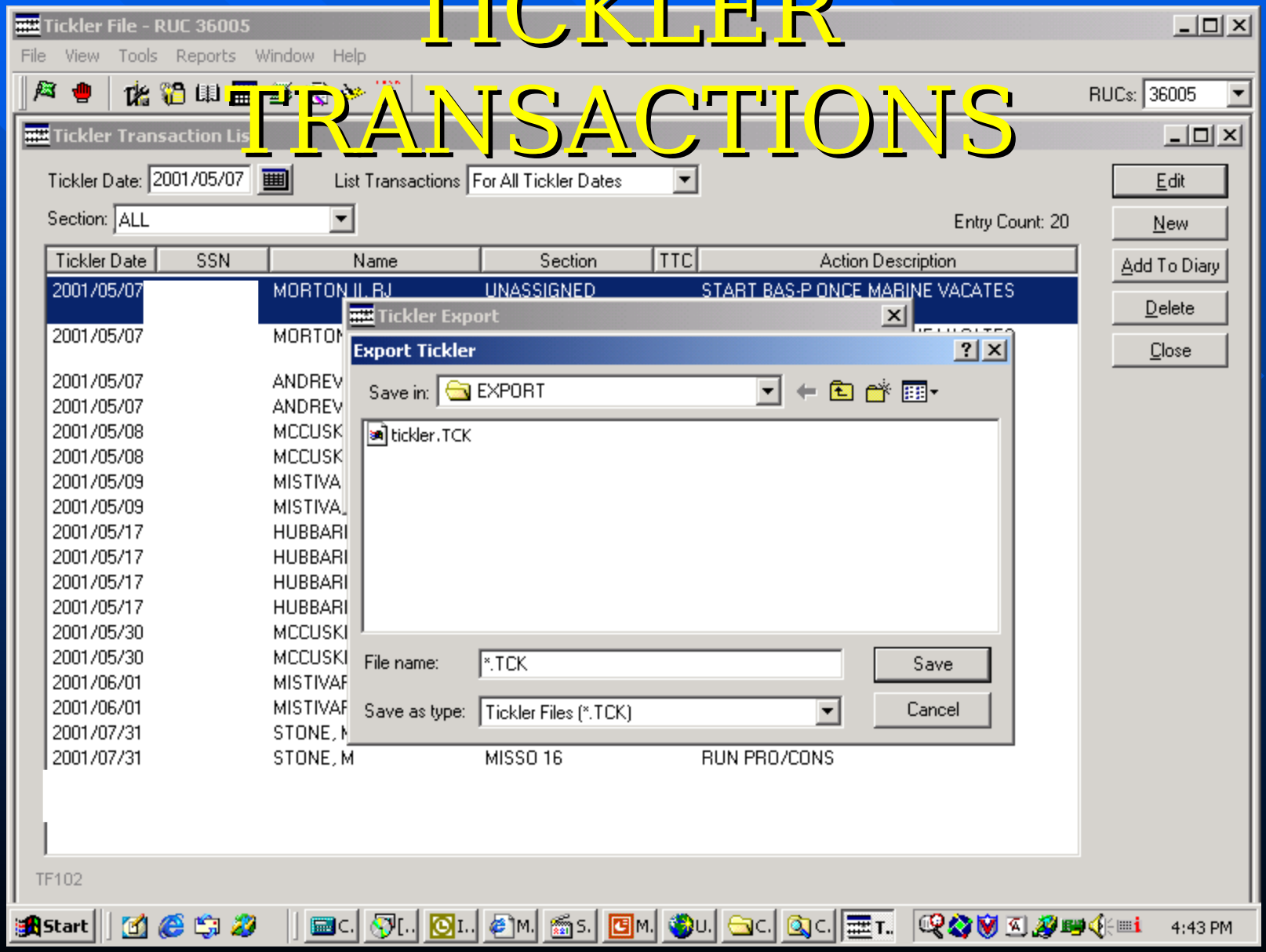
IMPORTING/EXPORTING TICKLER TRANSACTIONS

- The tickler file will automatically be saved under UDMIPS in your “EXPORT FOLDER”
- *Note that once you export your transactions you will still be able to view them in the Tickler File

IMPORTING/EXPORTING TICKLER TRANSACTIONS


Tickler File - RUC 36005
File View Tools Reports Window Help
RUCs: 36005
Tickler Transaction List
Tickler Date: 2001/05/07
Section: ALL
Entry Count: 20
Edit
New
Add To Diary
Delete
Close
Tickler Date | SSN | Name | Section | TTC | Action Description
2001/05/07 | | IL, RJ | UNASSIGNED | | START BAS-P ONCE MARINE VACATES
2001/05/07 | | | | | NE VACATES
2001/05/07 | | D, KF | MISSO 16 | | SEND THIS MARINE TO OKI
2001/05/07 | | D, KF | MISSO 16 | | SEND THIS MARINE TO OKI
2001/05/08 | | D, KF | MISSO 16 | | SEND THIS MARINE TO OKI
2001/05/08 | | D, KF | MISSO 16 | | SEND THIS MARINE TO OKI
2001/05/09 | | ER, JA | UNASSIGNED | | RUN TR ENTRY
2001/05/09 | | ER, JA | UNASSIGNED | | RUN TR ENTRY
Tickler Export
Choose Tickler Files:
All
From: 0000/00/00 To: 0000/00/00
OK
Cancel
TF105
TF102
Start
4:42 PM

IMPORTING/EXPORTING TICKLER TRANSACTIONS



Any Questions?